



Has the Tide Turned for Trade Unions?

Findings from the Skills and Employment Survey 2024

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HEADLINES

This report examines key trends in union membership in Britain and perceptions in the influence that unions have. The report also examines the demand for union representation among those employed at non-unionised workplaces and how these demands vary between different population subgroups. Against the backdrop of a long-term decline in union membership over the last four decades, the report paints a picture of relative stability in trade union membership and an increasing awareness of the influence of unions in recent years. There is also a representation gap, particularly among those who are arguably most vulnerable.

- In 2024, approximately one in four (27%) employees in Britain were trade union members, a decline of almost 20 percentage points since 1986. Over half of employees work at unionised organisations and these unions are, in a large part, recognised by management for the purposes of negotiating pay and conditions.
- The perceived influence of unions on the organisation of work has been increasing steadily among both members and non-members since 2012. Recent increases in the perceived influence of unions have been restricted to public sector employees, arguably reflecting the concentration of strikes in that sector.
- Over a third of employees working in non-unionised organisations report that they would vote to establish a union if they were given the chance. A third state that they would not vote to establish a union, whilst another third were undecided.
- The level of unmet demand for union representation within non-unionised organisations increases to a half among those aged 20-29. Among the LGBTQ+ community, 6 out of 10 would vote to establish a union if given the chance. Those who suffer from long term ill-health conditions are also more likely to vote to establish a union, with this rate increasing according to the severity of their ill-health condition.

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1. The Importance of Unions

Evidence suggests that trade union membership is associated with improved terms and conditions for workers and that these gains are not to the detriment of workplace performance. Indeed, research suggests that trade unions can help to improve productivity by supporting employee-led innovation. However, the long-term downward trend in union membership is well known. Based upon the administrative records of trade unions, membership within the UK peaked in 1979 at over 13 million. Since then, there has been a steady long-term decline. Recent data reveals that trade union membership has more than halved since its peak to around six million. Rates of union membership have, however, remained relatively stable since 2017.

The ability of trade unions to improve the conditions of their members may be eroded if falling membership is associated with reduced bargaining power. Nonetheless, in recent years strike activity in the UK has returned to levels last seen in the 1980s and early 1990s. Starting in the summer of 2022, an 18 month period of heightened industrial action, initially concentrated in the private sector and then moving to the public sector in 2023, resulted in over five million working days being lost. Explanations for these strikes included the cost-of-living crisis which has come off the back of stagnant long-term growth in real pay and an historically tight labour market which increased the confidence of unions to take action.

The election of the Labour Government has also signalled a change of climate towards trade unions. The Employment Rights Bill aims to give trade unions greater freedom to organise, represent and negotiate on behalf of their workers by repealing the Trade Union Act 2016 and the Strikes (Minimum Service Levels) Act 2023 which place restrictions on union activity. Trade unions also feature in the Get Britain Working White Paper as a means of helping people to stay in work through making jobs more secure, flexible and family-friendly. This report therefore presents timely new evidence on the prevalence of trade unions in Britain, their perceived influence, and the demand for union representation among those employed in workplaces where trade unions are not present.

2. Previous Evidence

The main source of data regarding trade union membership within the UK is the Labour Force Survey (LFS), with official government statistics about unions being based on this source. An annual question on trade union membership has been asked in the fourth quarter of every year since 1992. Questions on trade union presence at the workplace and recognition were added in 1993. A question on collective agreements was introduced in 1996. However, these union questions were revised substantially in 1999, creating inconsistencies in data collected on union presence and union coverage and limiting the period over which trends can be examined.

Concerns have also been raised as to whether estimates derived from the LFS capture the true extent to which trade unions engage in negotiations over the pay and conditions. Possible reasons include a lack of awareness of collective agreements among employees and under-reporting among proxy respondents. The wording of the

LFS question is also problematic. Whilst most surveys simply ask whether unions and staff associations are 'recognised' by management, the LFS asks whether pay and conditions are 'directly affected' by agreements between employers and trade unions, thereby asking for an assessment of their impact. As such, official estimates of collective bargaining coverage have been over a third lower than those derived from other sources. Reflecting these concerns, in 2022 official statistics moved to using data from the Annual Survey of Hours and Earnings (ASHE) as a measure of collective agreements. However, ASHE only provides consistent data on pay agreements from 2005 onwards, which limits its ability to examine long-term trends.

Aside from membership statistics, there is a lack of recent evidence about the attitudes of workers towards trade unions in Britain. The 2005 British Social Attitudes Survey repeated a module of questions on trade unions previously asked in 1998. Analysis revealed employees within unionised environments had a strong preference for retaining the union, with over a half of reporting that it made the workplace a better place to work. In non-union settings, the figure was just 18%. The BSA also included questions on the representation gap. When asked 'If there were a trade union at your workplace, how likely or unlikely do you think you would be to join it?', around two fifths of employees in both 1998 and 2005 reported that they would be either fairly or very likely to join. Recent evidence for Ireland suggests that almost half of non-union members would vote yes to establish a union at their workplace. No such evidence of the representation gap exists for the UK.

3. The Skills and Employment Survey 2024: A New Source of Evidence

The Skills and Employment Survey 2024 (SES2024) allows us to examine the changing influence of unions in Britain via comparisons with data from earlier surveys. The complete survey consists of three parts: a face-to-face survey of working adults aged 20-65 years old in Britain; an online survey of eligible respondents living in Britain who agreed to join a panel of respondents recruited from previous NatCen surveys; and an online survey of eligible workers living in Northern Ireland. For this report, we focus primarily on the face-to-face survey, hence the findings present a picture of trends in Britain. The sample for this survey was drawn using random probability principles stratified by several socio-economic indicators. Two eligible respondents per address were randomly selected for interview, 32% of those selected were interviewed and most were completed in 2024. All parts of the data collection process were directed by the research team and the fieldwork was conducted by NatCen.

SES2024 is the eighth in a series of nationally representative sample surveys of individuals in employment aged 20-60 years old (although the 2006, 2012, 2017 and 2024 surveys additionally sampled those aged 61-65). The numbers of face-to-face respondents were: 4,047 in the 1986 survey; 3,855 in 1992; 2,467 in 1997; 4,470 in 2001; 7,787 in 2006 (includes Northern Ireland); 3,200 in 2012; 3,306 in 2017; and 2,824 in 2024. Weights were computed for all surveys in the series. These correct for differential probabilities of sample selection, the over-sampling of certain areas and

response rate variations between groups (such as sex, age, occupation, and qualification level). All the analyses that follow use these weights.

4. Indicators of Union Prevalence and Influence

The SES captures information about union membership, union presence and union coverage. The survey firstly addresses the issue of *union presence* with all respondents being asked: ‘At your place of work, are there unions or staff associations?’. Among those respondents who report that a trade union is present at their workplace, *union coverage* is established with the follow-up question: ‘Is any union or staff association recognised by management for negotiating pay and/or conditions of employment?’. Finally, all respondents are asked: ‘Are you a member of a trade union or staff association?’. From this, we derive *union density*; that is, the percentage of employees who are trade union members. The wording, ordering, and routing of these questions is unique to the SES. Unlike the LFS, the question on trade union presence is asked of all respondents rather than just non-members. Similarly, the question on union membership is asked of all respondents rather than only being asked of those who are employed at workplaces which are covered by collective agreements. The questions on union membership and presence have been repeated since 1986, whilst the question on union coverage was introduced in 1997. This allows us to consistently examine trends in these different facets of union prevalence over a longer period than is possible with other data sets.

Whilst rates of union density, presence and coverage provide an indication of the prominence of trade unions, they do not capture trends in the perceived levels of *union influence* that trade unions have at the workplace. To address this issue, the SES asks those who were employed in organisations where trade unions were present: ‘How much influence do the trade unions in your establishment have over the way work is organised?’. In this report, we examine the incidence with which respondents report that unions have either a ‘great deal’

or ‘a fair amount of influence over the way work is organised’. This question has been included in every survey since 2001, allowing us to examine trends in the perceived influence of unions over the last two decades.

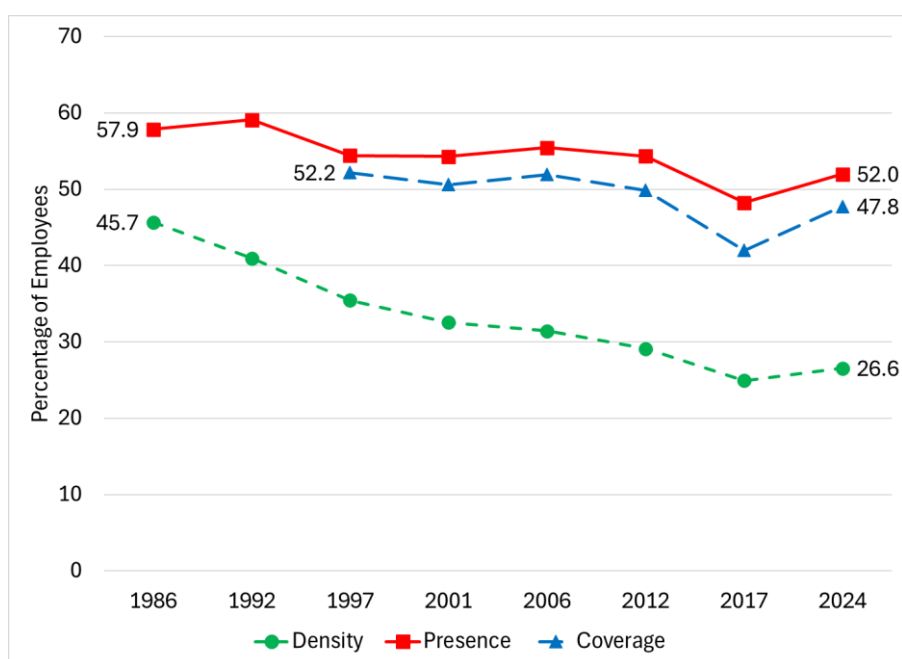
Low rates of membership among younger workers are often regarded as providing *prima facie* evidence of an inability of the trade union movement to reach out to new generations of workers. However, unions are not present in all workplaces and those employed within relatively unorganised sectors may not have the opportunity to join a trade union. An unmet demand for union membership can lead to a representation gap. Given the role of unions in protecting disadvantaged workers, this gap may vary between different groups of workers. To measure the disposition of workers towards trade unions, two new questions were introduced to the SES in 2024. Those employed in non-unionised workplaces were asked: ‘If a vote to establish a union was held in your organisation today, would you vote yes to establish a union or would you vote no to establish a union?’ A similar question was asked of those who worked in unionised organisations as to whether they would vote to retain union representation.

5. Findings

Trends in Union Membership

Estimates for 2024 indicate that approximately one in four (27%) employees in Britain were trade union members, a decline of almost 20 percentage points since 1986. In line with official statistics derived from the LFS, the rate of union membership has, however, remained stable in recent years. Data from the SES also reveal that approximately half of employees (52%) report that they work at unionised organisations and that these unions and staff associations are, in a large part, recognised by management for the purposes of negotiating pay and conditions (48%). Whilst the long-term decline in the rate of trade union membership appears to have ceased, rates of union presence and union coverage have increased between 2017 and 2024.

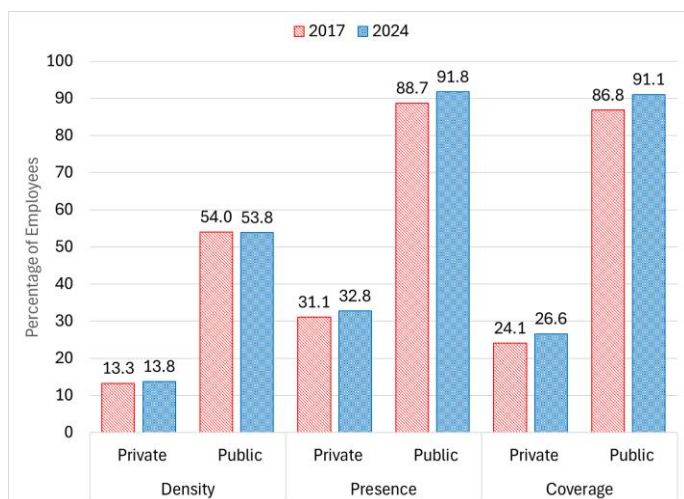
Figure 1: Trends in Union Membership



Analysis by sector presented in Figure 2 reveals the significant differences in these rates between those employed in the public and private sectors. The rate of union membership in the public sector (54%) is approximately four times higher than that observed in the private sector (13-14%). The rates of trade union membership in both sectors have remained relatively stable between 2017 and 2024.

Approximately nine out of ten workers in the public sector in 2024 report that trade unions are present at their workplace and that trade unions are recognised by management in negotiations over pay and conditions. Within the private sector, only a third of workers report the presence of trade unions at their workplace, whilst a quarter report that unions are recognised by management. Analysis by sector reveals that the overall increases in the rates of union presence and union coverage witnessed between 2017 and 2024 have been observed in both the public and private sectors. Workers in both sectors have therefore become increasingly aware of the presence of trade unions and of the involvement of these unions in negotiations over pay or other conditions of employment.

Figure 2: Union Membership by Sector: 2017-2024



The Increasing Influence of Trade Unions

Figure 3 examines the proportion of employees who report that unions have an influence over the way work is organised. The analysis is restricted to those who are employed at workplaces where unions are present. Union members are understandably more likely to report that unions have an influence over the way in which work is organised than non-members. This could reflect their belief in the value of trade unions and their ability to support improvements to pay and working conditions. Unions also communicate with their members, making them aware of the actions in which they are engaged and of the outcomes of any such activities. Data from SES2024 confirms that union members are more likely to report that unions have an influence over the way work is organised compared to non-members (51% compared to 39% in 2024). The perceived influence of unions on the organisation of work has been increasing steadily among

both members and non-members since 2012. The growth in the perceived influence of unions between 2017 and 2024 has been particularly apparent among union members. In the context of falling membership prior to 2017, trade unions appear to have become more effective in exerting an influence over the organisation of work.

Figure 3: Trends in Union Influence

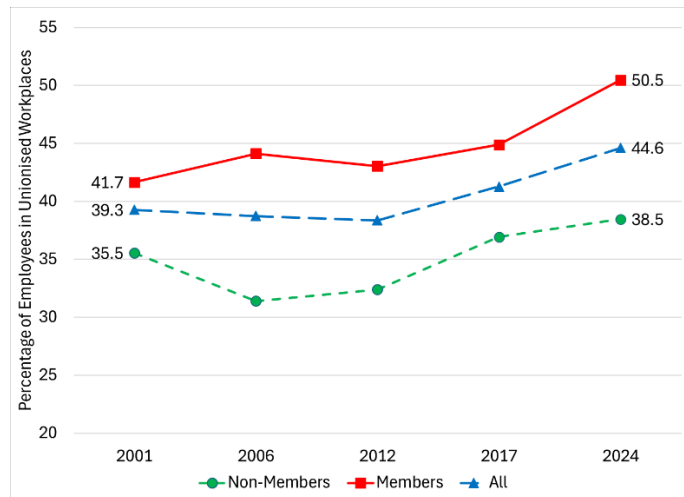
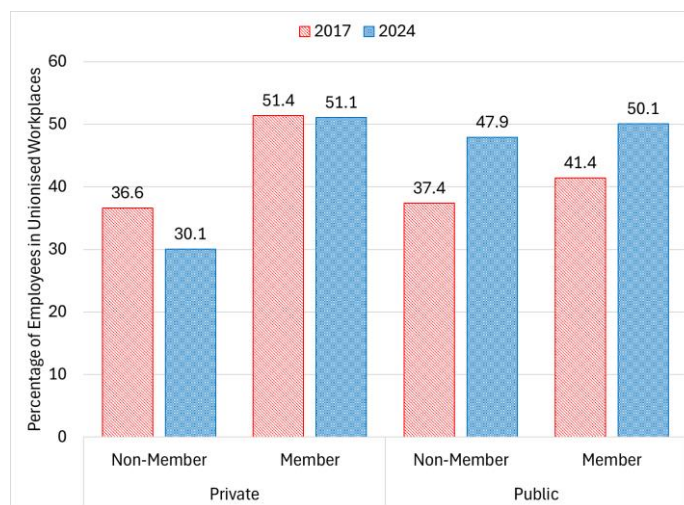


Figure 4 however reveals that this recent increase has been restricted to those employed within the public sector. Between 2017 and 2024, the proportion of employees who reported that unions exerted either a great deal or a fair amount of influence over the way work is organised increased by approximately ten percentage points among both members and non-members. However, within the private sector the perceived influence of unions has remained static among union members and has declined among non-members. These changes point towards the possible importance of the industrial action undertaken in 2023 by predominantly public sector workers in raising perceptions of trade union influence among that group.

Figure 4: Union Influence by Sector: 2017-2024



Attitudes Towards Trade Unions

We next examine attitudes towards trade unions and how these vary between different groups. To do this, we also include data from the two online surveys and so present a picture of the United Kingdom, including Northern Ireland. Figure 5 shows that amongst those working in non-unionised workplaces across the UK, when asked how they would vote if a ballot was held to establish a union within their organisation, just over a third of employees (36%) reported that they would vote 'yes', around third said that they would vote 'no' (31%) and a third stated that they were undecided (32%). Amongst those employed in organisations where unions were present, when asked if a ballot were held to keep the union, three quarters of employees (74%) said that they would vote 'yes'. Only 5% employees indicated that they would vote to cease the operation of the union, although approximately one in five (21%) were undecided.

Figure 6 examines how the unmet demand for unionisation varies across selected population subgroups, including those with protected characteristics as defined under equalities legislation. It can be seen that 43% of non-unionised employees aged 20-29 would vote in support of the establishment of a union at their workplace compared to less than a third of employees aged 40 and over. Among employees from the LGBTQ+ community who work in non-unionised organisations, over six out of ten report they would vote for the establishment of a union. Those who suffer from long term ill-health conditions are also more likely to be in favour of the establishment of a

union, with this rate increasing according to the extent to which they report being limited by their ill-health condition. Just over half (51%) of employees who report that they are limited a lot by an ill-health condition indicate that they would vote to establish a union at their workplace compared to 34% among those who report having no ill-health conditions. Finally, workers in Northern England and the Devolved Nations are more likely to be in favour of establishing a union, which may be due to the stronger ties towards unions in these once industrialised areas.

Figure 5: Attitudes Towards Trade Unions

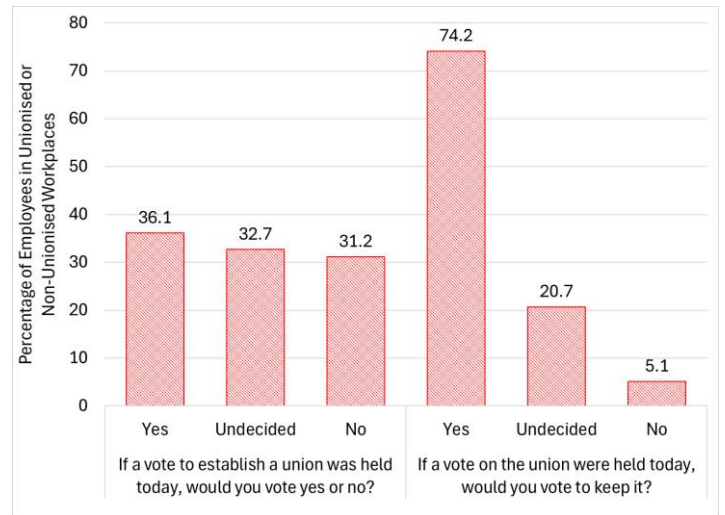
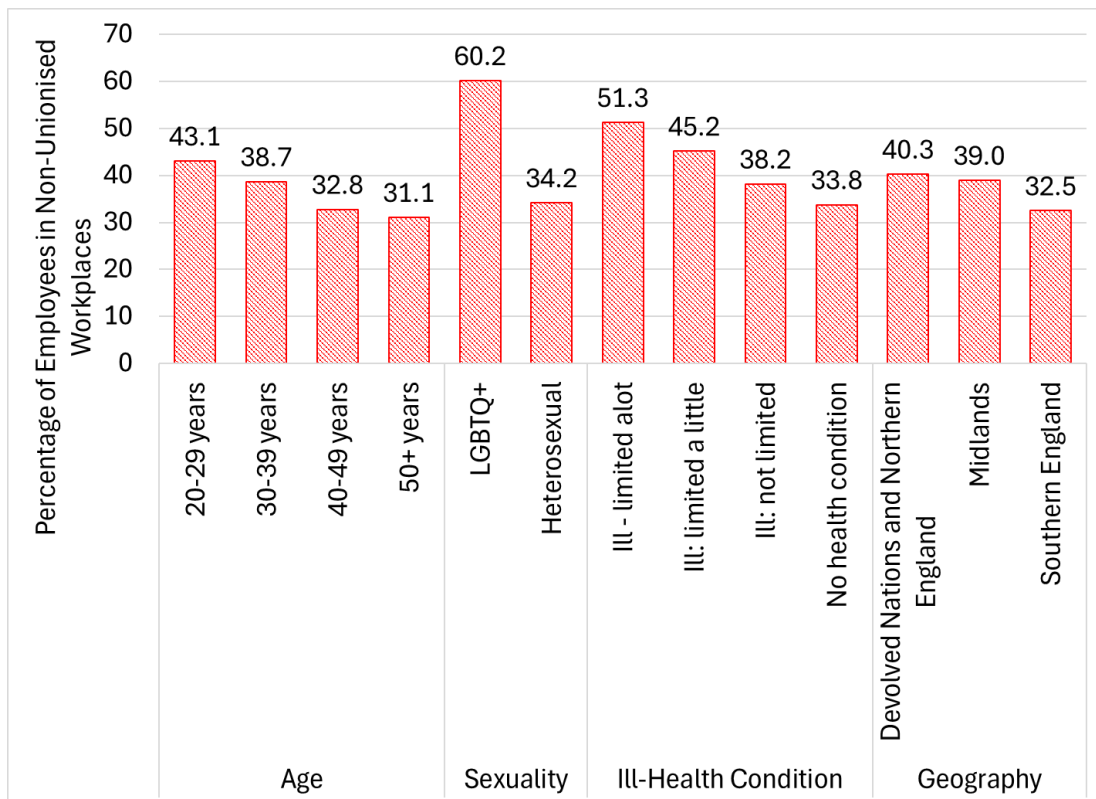


Figure 6: Unmet Demand for Unionisation



6. Policy Implications

Against the backdrop of a long-term decline in union membership over the last four decades, the report paints a picture of relative stability in trade union membership and an increasing influence of unions in recent years. By making jobs more secure and supporting worker voice, trade unions can increase productivity by supporting skill acquisition and improving levels of participation at work. There remain high levels of unmet demand for unionisation. Among younger workers who are more likely to be employed in relatively unorganised sectors of the economy, preferences for unionisation are not being realised. This representation gap is also higher among workers who may feel more vulnerable to discrimination. These findings provide new insights for trade union strategists, equality organisations and policymakers who have an interest in addressing the working conditions of disadvantaged groups. It appears that these groups have

stronger preferences for union representation, potentially as a means towards improving their working conditions and addressing the inequalities that they face. These groups could potentially benefit more from the measures recently introduced under the Employment Rights Bill aimed at lifting restrictions on union organising activity.

In terms of supporting the revitalisation of the labour movement, this report also points to the importance of approaches to the organisation of labour that look beyond traditional workplace-based strategies. The trade union movement should also aim to reach out to non-unionised groups with shared interests and common collective identities that appear to encourage people to want to join trade unions irrespective of where they work. Tapping into these favourable attitudes should also consider differences in the inherited attitudes towards trade union membership that persist across different parts of the UK.

Further Reading

Bryson A and Davies, R (2019) 'Family, place and the intergenerational transmission of union membership', *British Journal of Industrial Relations*, 57(3): 624-650.

Bryson, A and Forth, J (2017) The Added Value of Trade Unions, London: Trades Union Congress.

Department for Business and Trade (2024) Trade Union Membership, UK 1995-2023: Statistical Bulletin., London: Department for Business and Trade.

UnionMaps presents estimates of trade union membership and the coverage of collective pay agreements for over 400 geographical areas in Britain. UnionMaps provides data based upon area of residence for union density, union presence, union coverage and collective pay agreements. Use this service to produce area reports of union membership for a particular location or to map the data to see how the different measures of union membership vary across Britain. Visit UnionMaps to find out how high trade union membership is where you live and how it has changed over recent decades.

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All titles are downloadable free from the survey website: wiserd.ac.uk/project/ses/ses2024. The NatCen SES2024 Technical Report which outlines in detail how the data were collected along with the questionnaires used is also available. You may also like to take the www.howgoodismyjob.com quiz which is based on some of the questions used in the survey.

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